



Request for Qualifications (RFQ) #CEZ20160407

Strategic Planning Consultant

The Columbia Empowerment Zone, Inc. (CEZ, Inc.), Board of Directors, request qualification responses from individuals or firms for the purpose of developing a strategic work plan. CEZ, Inc. is looking to secure the services of an individual or firm that has extensive experience in conducting multi-year strategic planning and multi-year action planning for nonprofit economic development corporations.

The CEZ, INC. reserves the right to issue an award under this RFQ to a single or multiple individuals or firms, at its sole discretion. If CEZ, INC. determines that no applicant meets the requirements of this RFQ, the CEZ, INC., at its sole discretion, reserves the right to reject all applications. CEZ, INC. may award all, or a portion thereof, of services at its sole discretion.

Qualified individuals/firms will be placed on an eligibility list, from which CEZ, INC. may select as needed for the period May 1, 2016 or before through May 30, 2017.

Timeline

RFQ Released: March 7, 2016

Applications Due: April 7, 2016 by 12:00 noon

Review of Written April 7, 2016

Contractor Interviews (if needed) by March 31, 2016

Notification of Intent to Award by April 25, 2016

Corporation Authorization April 20, 2016

Anticipated Contract Start May 1, 2016

All dates of the Application review process are subject to change. If a significant date is changed, all known recipients of the original RFQ will be notified of the new date. In addition, information will be posted at www.columbiasc.net/cez

Columbia Empowerment Zone, Inc.
3905 Ensor Avenue Columbia, SC 29203
Eau Claire Town Hall, 1st floor, Monticello Rd. Entrance
Telephone: (803) 733-8438

SECTION 1: INTRODUCTION

The Columbia Empowerment Zone, Inc. (CEZ, Inc.) serves as a catalyst agency to promote, facilitate and lead economic development activities in the City of Columbia and adjacent Richland County. Currently CEZ, Inc. initiates projects and program that encourages recruitment, expansion and retention of businesses which creates opportunities for job creation.

As a component unit of the City of Columbia, CEZ, INC. operates as a 501(c)(3) non-profit organization with a Columbia vision of a socially and economically vibrant community with sustainable jobs and thriving small businesses. CEZ, INC. mission is to create and support economic development opportunities in the City of Columbia. Since CEZ, INC.'s inception, which derived from the 1999 Sumter-Columbia Empowerment Zone Grant, CEZ, INC.'s overarching goal continues to focus on revitalization efforts, the elimination of blight and the creation of jobs that support and uplift diversity, urban renewal, residential vibrancy, sound economic investments and financial prosperity. It's past, current and future development projects and initiatives are the vehicles that have and will continue to steer both commercial and residential growth and renewal.

Most recently, in 2011, CEZ, INC. completed the start of a two- year Strategic Plan, but did not development a work plan of action for the organization.

The purpose of this RFQ is to obtain consulting/affiliating services to assist CEZ, INC. in the development of a three to five – year strategic plan of action that will result in a strong financial plan for organizational sustainability.

SECTION 2: BACKGROUND

CEZ, INC. is currently working from a document that was developed in 2011, that was created immediately following the transition of the CEZ, INC. Board of Directors and staff. As we enter the next phase or organization growth, the board and staff are eager to develop a strategic work plan that will guide our operations for the next several years.

We want a process that will include the organization's staff and board of directors and, perhaps, key stakeholders, and that will create a work plan for the next stage of our organization's journey. The level of detail in the work plan will be determined during the planning process.

Submit questions regarding this Request for Qualifications (RFQ) via email to Felicia Maloney at fmaloney@columbiasc.net. Questions will be accepted until March 25, 2016, and answers will be posted on the Columbia Empowerment Zone, Inc. website <http://www.columbiasc.net/CEZ, Inc.>

SECTION 3: TIMELINE AND DELIVERABLES

Contract Timeline

The contract will be executed on or before May 1, 2016, and remain in effect through May 30, 2017. Additional tasks related to presenting and promoting the plan may be extended or granted upon approval of the CEZ, INC. Board of Directors.

Scope of Work

The scope of work will include:

- A. Set-up and facilitation of Board of Directors training and/or retreat focused on a work plan of action, governance, oversight, rules of operation, and financial plans for the Corporation.
- B. Engagement with CEZ, INC. staff and a small steering committee of the Corporation to plan the strategic planning process and provide regular status updates;
- C. Review of CEZ, INC.'s current strategic plan, funded programs, and evaluated results;
- D. Possible set up and facilitation of two or more stakeholder forums/meetings;
- E. Synthesis of data from the program review and stakeholder forums/meetings;
- F. Presentation of an updated 5-year strategic work plan and financial plan for review and approval at a Corporation's meeting;
- G. Other work as mutually agreed upon between CEZ, INC. and the selected responder.

SECTION 4: QUALIFICATIONS

CEZ, INC. invites responses from individuals/firms with proven expertise in strategic planning, creating work plans of action, Board Development, and financial analysis. In addition, CEZ, INC. seeks individuals/firms with the following:

- A. Experience developing and revising strategic plans and long-term financial plans;
- B. Experience facilitating collaborative processes;
- C. Experience building consensus among constituents with varying opinions;
- D. Experience with organizations serving small businesses;
- E. Expertise in financial planning;
- F. Familiarity with City of Columbia;
- G. Strong written and oral communication skills;
- H. Demonstrated ability to work collaboratively.
- I. Demonstrated level of knowledge and expertise related to long-term financial planning.
- J. Demonstrated ability to describe the proposed project activities needed to complete the strategic plan and long-term financial plan, including timelines, responsible parties and deliverables.
- K. Must possess the ability to indicate how successful completion of each deliverable will be measured. Please note that the final scope of work will be negotiated with CEZ, INC. prior to contract execution.
- L. The Scope of Work will be assessed according to the degree to which the proposed planned activities have been clearly described in the response as well as demonstrated understanding of CEZ, INC.' needs as outlined in the response.

Budget and Budget Narrative

Provide a project budget that includes:

- A. The personnel costs and/or hourly rate(s) for consultant(s) assigned to the project.
- B. Other anticipated project costs. Project budgets may include no more than 10% of the total personnel/consultant costs for administrative overhead/indirect costs. Identify the specific cost factors you have included as overhead/indirect. A separate page with a budget narrative with a brief justification for each line item.
- C. The budget will be assessed in terms of the degree to which it is realistic, in alignment with the proposed Scope of Work, reveals a cost effective allocation of resources, adequately explains

Resumes of Primary Consultant and Key Associates

- A. Resumes for the project lead and other key project staff and/or consultants.
- B. References and Work Samples
- C. Provide at least three (3) references from previous organizations that are similar in nature and scope to this project and one (1) work sample from a comparable project.

SECTION 5: SELECTION PROCESS

All applications will be reviewed by a Review Committee established by Columbia Empowerment Zone, Inc. Independent; non-conflicted reviewers with particular subject matter expertise will be invited to assist in the evaluation of applications, at the sole discretion of the Corporation. Potential contractors or persons affiliated with applicant organizations are not eligible to serve as reviewers for such applications. Participants on the Review Committee may not respond and may not assist others in responding to this RFQ. Based upon recommendations from the Review Committee, Columbia Empowerment Zone, Inc. will make final funding decisions.

There is no guarantee that submission of a response to this RFQ will result in funding, or that funding will be allocated at the level requested. The Corporation reserves the right to fund one responder, multiple responders, or none.

The Review Committee may, at its sole discretion, select responders for interviews. In that event, interviews, which may be in person or by phone, should take place by March 31, 2016.

References will be consulted.

The successful respondent will be required to enter into a contract with, and provide required insurance endorsements to, Columbia Empowerment Zone, Inc.

SECTION 6: SUBMITTAL PROCESS

1. Interested parties must submit RFQ by 12:00noon on April 7, 2016, to 3905 Ensor Avenue, 1st floor, Monticello Road Entrance, Columbia, SC 29203 or via mail to P O Box 141, Columbia, SC 29202 to Felicia Maloney with a subject line "Strategic Planning RFQ."

2. An email confirmation will be sent within one business day to indicate the RFQ was received prior to the deadline. If an email confirmation is not received within one business day of the submission, it is the responsibility of the applicant to contact Ms. Felicia Maloney or Ms. Verdine Gleaton via phone at (803) 733-8438 or (803) 255-8129.

3. Email or Faxed submissions will not be accepted.

4. Respondents are responsible for ensuring that RFQs are received on time.

5. No RFQ modifications or corrections will be accepted after the deadline.

6. This RFQ is available at www.columbiasc.net/CEZ, Inc.